

December 29, 2009

TO: Teresa Parsons  
Director's Review Program Supervisor

FROM: Kristie Wilson  
Director's Review Investigator

RE: **Wendy McFadden v. Olympic College (OC)**  
**Allocation Review Request No. ALLO-09-046**

On November 19, 2009 a Director's Review meeting took place by telephone conference call concerning the allocation of Wendy McFadden's position. Present during the telephone conference call were Wendy McFadden, OC; Candace Alvarez, OC; James Grimsey, WPEA; Jacquie Curry, OC HR office; Annie Davis, OC HR office; Joseph Karoma, Associate Dean Student Financial Services; Diana Larson, Dean of Enrollment Registrar; and myself.

### **Investigator Finding**

As the Director's review investigator, I carefully reviewed and considered all of the documentation in the file, the class specifications, and the information provided during the Director's review conference. Based on my review and analysis of Ms. McFadden's assigned duties and responsibilities, I find that the classification that best fits Ms. McFadden's overall duties and responsibilities is the Program Specialist 2.

### **Background**

On February 11, 2009 Ms. McFadden submitted a Position Review Request Form (PRR) to OC HR Office requesting that her position be allocated from a Program Coordinator to a Program Manager B. Ms. Davis and Ms. Curry reviewed her request and issued their decision by letter dated May 27, 2009 (Exhibit A-4). In their letter, Ms. Davis and Ms. Curry approved the request to reallocate Ms. McFadden's position from a Program Coordinator to a Program Specialist 2 effective February 13, 2009.

On March 27, 2009 Ms. McFadden's supervisor, Joseph Koroma, submitted a memo to OC HR office (Exhibit A-9) regarding Ms. McFadden's desk audit stating that he does not feel that all the information in Ms. McFadden's PRR is accurate and complete. Mr. Koroma feels that Ms. McFadden's duties are essential functions of a Program Specialist. On June 26, 2009, Ms. McFadden filed a request for a Director's review.

### **Summary of Ms. McFadden's and Mr. Grimsey's Comments**

Ms. McFadden works in the Veterans' Services office at OC. Ms. McFadden asserts that her primary job duties consist of:

- Supervising, hiring, and training office personnel in assisting veterans to determine and achieve their OC program objectives.
- Determining VA educational benefits, determines that veterans are in compliance with educational objectives and OC graduation criteria, and determines that OC is in compliance with Federal and State laws and regulations concerning benefits.
- Administering and managing veteran outreach.
- Representing Veteran's services at meetings with other OC departments.
- Budget work

Ms. McFadden feels that her position is clearly a Program Manager B. She states that she administers, supervises, directs, and advises on activities involved in providing an essential management service within the institution. Although there is a "chain of command" in place, she feels there is little to no specific direction from that "chain" with regard to the Veterans' Services program.

Ms. McFadden explained that she interprets Federal and State regulations pertaining to veteran educational benefits then implements, manages, and administers all facets of the Veterans' Services program to ensure that OC is in compliance with applicable governing regulations.

Ms. McFadden explained her supervisory duties. She states that she supervises one part-time Program Assistant that is on contract with the office. In addition, she supervises three part-time work study students that work 20 hours a week. She states that although she does not perform their evaluations, she is involved in the hiring. She did state that she does not perform the interviews for these positions but prepared the interview questions. Her supervisor, Mr. Koroma, does the hiring. Ms. McFadden asserts that she trains the employees and assigns the work to them. In addition, she initials their time cards for accuracy.

Ms. McFadden feels that because she administers, supervises, directs, and advises on all activities pertaining to the Veterans' Service program that her position is far above the work of a Program Specialist 2.

### **OC HR Office and Mr. Koroma (Supervisor) Rationale**

OC HR office states that Ms. McFadden's position description, signed June 1, 2005 (Exhibit A-3), is accurate. OC HR office asserts that the majority of the duties and responsibilities assigned to Ms. McFadden's position are within the scope and intent of the Program Specialist 2 classification. Those duties include:

- Under general supervision, perform work requiring knowledge and experience specific to federal, state, and institutional policies that cover veteran's educational benefits.
- Represent the Veteran's Service office to students and the general public
- Process applications
- Advise and interpret policies, procedures, and regulations
- Train work study students
- Compose written communications
- Prepare reports
- Purchase supplies

OC HR office asserts that Ms. McFadden is not classified as a supervisor. All supervisors must have required training that they attend. Ms. McFadden leads a part-time Program Assistant that works no more than 19.5 hours a week. In addition, she leads two work study students. OC HR office confirmed that Mr. Koroma does all of the interviewing and hiring of these positions. Ms. McFadden's duties as being a lead consist of:

- Reviewing time cards and initialing
- Training
- Scheduling

When OC HR office asked Ms. McFadden if she prepares and advises management of budget issues, she replied "no." Ms. McFadden approves promissory notes but does not approve proposed expenditures; this is done by a Budget Analyst.

OC HR office feels that although Ms. McFadden does an excellent job and is an expert in her field; her duties do not rise to the Program Manager B level. They feel the decision to reallocate her upward from Program Coordinator to Program Specialist 2 was appropriate.

### **Reason and Basis for Finding**

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Most positions within the civil service system occasionally perform duties that appear in more than one classification. However, when determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. See Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

The definition for Program Specialist 2 states:

Positions at this level work under general supervision and plan, organize, direct and coordinate operations for programs such as the business enterprise, volunteer services and community resources, elections examination/administration programs. Incumbents oversee day-to-day program operations, function as the program representative and resource, have extensive contact with program participants and outside entities, and resolve problems within a delegated area of authority. Unusual problems, probable outcomes and solutions are presented to higher levels for resolution. Incumbents may be delegated limited authority to approve budget expenditures and may assist higher-level staff with developing and coordinating statewide program activities.

Ms. McFadden works under general supervision, performs work requiring knowledge and experience specific to the federal, state, and institutional policies that cover veteran's educational benefits.

The majority of Ms. McFadden duties consist of:

- Accepting and reviewing applications from veterans for educational benefits.
- Advising and interpreting policies, procedures, and regulations.
- Monitoring enrollment status.
- Certifying correct enrollments of each eligible student to the assigned VA office.

- Developing and maintaining departmental policies and procedures.
- Leading and training work study students and one part-time Program Assistant.

As indicated in Mr. Koroma's memo (exhibit A-9), Ms. McFadden does not supervise full-time classified staff. She directs and leads the work of part-time staff.

The scope of her assignments fall within the Program Specialist 2 classification.

As previously noted by the Personnel Resources Board (PRB), the following standards are primary considerations in allocating positions:

- a) Category concept (if one exists).
- b) Definition or basic function of the class.
- c) Distinguishing characteristics of a class.
- d) Class series concept, definition/basic function, and distinguishing characteristics of other classes in the series in question.

After reviewing the documentation and comments from all parties with regard to Ms. McFadden's assigned duties and responsibilities, I conclude the Program Specialist 2 classification best describes Ms. McFadden's position.

### **Appeal Rights**

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to the Washington personnel resources board. Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board is P.O. Box 40911, Olympia, Washington, 98504-0911. The physical location of the Personnel Resources Board is 600 South Franklin, Olympia, Washington.

If no further action is taken, the Director's determination becomes final.

cc: James Grimsey, WPEA  
Wendy McFadden, Olympic College  
Jacque Curry, Olympic College HR Office  
Lisa Skriletz, DOP Classification and Pay Manager

Enclosure: Exhibit List

## Exhibit List

### A. Wendy McFadden Exhibits

1. Letter of request for Director's Review June 25, 2009:
2. Director's Review Request form.
3. Position Description Form Position 2256 dated June 2005
4. Olympic College allocation determination dated May 27, 2009.
5. Position Review Request February 2009
6. Program Specialist 2 Classification Specifications 107I.
7. Program Manager B Classification Specifications 107S.
8. Veteran's Program Manager-Job Description
9. Memo to HR from Joseph Koroma March 27, 2009 re: desk audit
10. Supervisor's page from PRR

***SEE WPEA EXHIBIT LIST BELOW (SCANNED 7 PAGES)***

### B. Olympic College Exhibits

1. Allocation determination letter
2. Class Specifications: Program Specialist 2 (107I)
3. Position Review Request signed/3-2009
4. Job Announcement
5. Position Description signed/6-2005
6. Class Specifications: Program Manager B (107S)
7. Class Specifications: Program Coordinator (107N)
8. Class Specifications: Program Support Supervisor 1 (107P)
9. ~~Class Specifications: Program Specialist 2 (107I)~~ **Same as #2**
10. Class Specifications: Program Manager A (107R)

**Wendy McFadden  
September 24, 2009**

1-1	Introduction	
1-2	Email to Joseph Koroma	December. 1, 2008
1-3	Email to Song M. Uh	June 24, 2009
1-4	Email to Song M. Uh	June 23, 2009
1-5	Email to Roger Nick	October 6, 2008
1-6	Email to Joseph Koroma	August 12, 2008
1-7	07-08 Catalog Approval	August 28, 2007
1-8	Email to Gloria Martin	September 19, 2006
1-9	Email from Rita Frangione	
1-10	Veteran Services Web Site	
1-11	Email to Nora Downard	February 15, 2008
1-12	Email to Susan Clark, VBASEAT	November 15, 2006
1-13	Veteran's Master Calendar	
1-14	Overview-Veterans" Benefits Certification	
1-15	School Certifying Officials	August 1, 2008
1-16	Email to Kristy Anderson	
1-17	Historical Documents	January 25, 2009
1-18	Email to Susan Clark	March 23, 2009
1-19	Email from Susan Clark	June 9, 2008
1-20	Email to Admissions and Registration Council	January 9, 2009
1-21	Email from Janell Whiteley	
1-22	Email to Gayle Dilling	May 21, 2007
1-23	Email to Lee	August 23, 2007
1-24	Email Donna Ashman	June 26, 2008
1-25	Email from Vets List Serve	July 31, 2008
1-26	Letter from Wendy	April 2, 2008
1-27	Email from Wac250	June 11, 2007
1-28	Veteran Dependents 100% Tuition Waiver	
1-29	Eligibility Guideline for FPS 70	June 27, 2005
1-30	Eligibility Guideline for FPS 70	
1-31	Credit Hour and Award Decision Tree	
1-32	Notes on Chapter 35 Process	August 3, 2007
1-33	Letter to Francie Wright	November 2, 2005
1-34	Request for decision	
1-35	Memo to file	July 25, 2005
1-36	Letter to Janell	August 3, 2005
1-37	Fallen Verdeans' Waiver	July 22, 2007
1-38	Letter to student	November 6, 2007
1-39	Veteran Dependents 100% Tuition Waiver	June 29, 1905
1-40	Memo to Waves Manuel	9-Jul-07
1-41	Memo to file	November 26, 2008
1-42	Catalog Approval	

# Director's Determination for McFadden v. OC

ALLO-09-046

Page 8

1-43	Veterans' Services Board Report	November 10, 2008
1-44	Email to Bob Parker	August 5, 2005
1-45	Fax to Christina Rude	April 2, 2008
1-46	Advising Requested form	
1-47	ESSB 6371	June 18, 2008
1-48	07-08 Catalog Approval	August 28, 2007
2-1	Veterans' Services overview	
2-2	Veterans' Services Office Figures	2001-2007
2-3	Veterans' Program Summary	June 28, 2005
2-4	Veterans' Services overview	
2-5	Veterans' Services overview	
2-6	Veterans' Services overview	
2-7		
3-1	Veterans' Interest Survey	October, 2008
3-2	Veterans' Experience Survey	October, 2008
3-3	Veterans' Experience Survey, Duplicate	October, 2008
3-4	Email to Dianna Larsen, Robert Parker	August 3, 2006
3-5	Email to Becky Riverman	August 3, 2006
3-6	Email to Betsy Abts	August 2, 2006
3-7	Email to Michael Scroggins	July 25, 2006
3-8	Email from Dianna Larsen	July 24, 2006
3-9	Veterans' Services Board Report	
3-10	Veterans' Services Mission	
3-11	Email to Melinda StJohn, Angelina Gallegos	July 13, 2007
3-12	Guidelines for Eligibility for FPS70	August 23, 2005
3-13	Eligibility for FPS 70	August 25, 2005
3-14	Email to Joseph Koroma	July 18, 2008
3-15	Email to Ms. Askew	August 29, 2008
3-16	Letter to Dept of Veterans Affairs	June 1, 2009
3-17	Information about Training for Counselors & SEAC Staff	February 17, 2009
3-18	Letter to Randy Lawrence	May 3, 2006
3-19	Veteran's Master Calendar	September 22, 2008
4-1	Email to Susan Clark	November 18, 2008
4-2	Email to Joseph Koroma	July 31, 2008
4-3	Email to Joseph Koroma	
4-4	Table of expenditures	
4-5	Short term loan form	March 25, 2008
4-6	Promissory Note	
4-7	Notes, Veterans' Tuition Waivers	February 11, 2009
5-1	Email to David Mitchell	August 12, 2008
5-2	Letter to Laurie Adamson	January 31, 2006
5-3	Letter to Dr. Judi Brown, Dr. Denise King, Dr. Richard Strand	February 8, 2005
5-4	Veterans' Information	



# Director's Determination for McFadden v. OC

ALLO-09-046

Page 9

5-5	Overview of Veterans' required steps	
5-6	Notes of meeting	November 8, 2004
5-7	Notes of meeting	February 10, 2005
5-8	Copy List	
5-9	Program Mission	September 1, 2008
5-10	Email from Gina Huston	October 30, 2007
5-11	Program Mission	2007-2008
5-12	Student Services Self Evaluation	Fall 2005
5-13	Veterans' Information	
6-1	Letter from Dr. Mitchell	
6-2	Veterans' Interest Survey	October 1, 2008
7-1	Email to Coral Mason	July 7, 2008
7-2	Email to John Lee	January 30, 2008
7-3	Email to John Lee	January 31, 2008
7-4	Email from Nancy Bermea	November 14 2006
7-5	Email from Mona Sanders	July 24, 2007
7-6	Email from Dianna Larsen	December 4, 2008
7-7	Email to Bruce	
7-8	Email to Barbara Martin, Janell Whitely	March 27, 2009
7-9	Proposal for Disseminating Information	
7-10	Mission Statement, Veterans' Support Group	December 8th, 2008
7-11	The Benefits-VA Information	
7-12	What is a VET Friendly School	
8-1	Email to Rita Rangione, Song M. Uh, Vincent Dimone, Linda Roper	
8-2	Email to Song M. Uh	
8-3	Instructional Policies Council Minutes	December 1, 2008
8-4	2008-2009 IPC Membership	March 5, 2009
8-5	Notes for presentation to President's Cabinet	August 12, 2008
8-6	Email to Pat Ward	November 29, 2006
8-7	Email from Lee Williams	December 1, 2006
8-8	Email from Lee Williams	December 1, 2006
8-9	Email to Gloria Martin	November 29, 2006
8-10	Email from Pamela Farrior	December 13, 2006
8-11	Email to Joseph	
8-12	Email from Christina Rude	May 21, 2007
8-13	Definition of Mission	
8-14	Notes to file, Engineering Advising	July 7, 2005
8-15	Survey, Outreach Project	Fall 2005
8-16	Telephone Script	
8-17	Form letter to Students	
8-18	The Veterans Office Serves statement	
8-19	Liaison letter between Campus and VA	

# Director's Determination for McFadden v. OC

ALLO-09-046

Page 10

9-1	Veterans' Service Office Brochure	
9-2	Veterans' Services tuition waiver flow chart	
9-3	VA Education Benefits Pay Rates	October 1, 2008
9-4	If You Need Help	November 7, 2005
9-5	Veterans' Services retraining flow chart	
9-6	Veterans' Services Dependent Tuition Waiver flow chart	
9-7	Email to Roger Hopkins	November 15, 2006
9-8	Email to Dodi Fode	October 24, 2006
9-9	Email to Roger Hopkins	October 24, 2006
9-10	Email to Veterans' Services	July 18, 2008
9-11	Email to Carol Vineyard	August 20, 2007
9-12	Email to Veterans' Services	August 7, 2007
9-13	Email to Sean Socorso	August 2, 2007
9-14	Email from Dusty VanGelder	July 31, 2007
9-15	Email to Veterans' Services	July 30, 2007
9-16	Email to Debbi Campbell	February 1, 2008
9-17	Email to Help Desk	January 16, 2008
9-18	Email to Veterans' Services	January 5, 2008
9-19	Email to Dave Geisert	December 27, 2007
9-20	Email to Help Desk	December 18, 2007
9-21	Email to Veterans' Services	November 9, 2007
9-22	Email to Veterans' Services	October 22, 2007
9-23	Email from Robert Pelham	October 16, 2007
9-24	Email to Veterans' Services	September 19, 2007
9-25	Email to Veterans' Services	May 14, 2008
9-26	Email to Veterans' Services	February 7, 2008
9-27	Email to Veterans' Services	July 11, 2006
9-28	Email from Tonya Tiger	November 8, 2006
9-29	Email from Tonya Tiger	November 20, 2006
9-30	Work Study Sites	
9-31	Email to Dianna Larsen	December 18, 2006
9-32	Letter to Dusty VanGelder	
9-33	Letter to Dusty VanGelder	
9-34	Letter from Dusty VanGelder	
9-35	Email to Veterans' Services	May 14, 2008
9-36	Letter from Dusty VanGelder	
9-37	Email to Dianna Larsen	July 24, 2007
9-38	Registration Hold Request Forms	
9-39	Tuition Assistance	
9-40	Information for students trying to contact the VA	
9-41	Letter to Veterans' Services	November 15, 2004
9-42	Letter to Dusty VanGelder	December 20, 2007
9-43	Letter to Dusty VanGelder	February 1, 2008
9-44	Verifying Enrollment information	July 6, 2009
9-45	VA Work Schedule	Winter 2007
9-46	Steps for Student Intake	
9-47	Steps to use VA-ONCE	

# Director's Determination for McFadden v. OC

ALLO-09-046

Page 11

9-48	Process review document	
9-49	Email from David Mitchell	August 21, 2008
9-50	Email from Dianna Larsen	June 13, 2007
9-51	Posting Grades Information	August 24, 2009
9-52	Letter to Dianna Larsen	March 6, 2007
9-53	Letter to Veterans' Services	November 2, 2004
9-54	Process for Chapter 31 Certifications	
9-55	Letter regarding Peter Schmidt Presentation	October 16, 2008
9-56	MOU between The Department of Veterans' Affairs and Olympic	April 1, 2005
9-57	Daily required work	
9-58	Notes for conversation with Jeff Reyes	November 20, 2008
9-59	Authorization for Release of Information	
9-60	Veterans' Services	September 14, 2009
9-61	Letter to David Geisert	November 13, 2007
9-62	Notes for conversation with Linda Pierce	March 5, 2007
9-63	Vocational Rehabilitation Students	2001-2007
9-64	Check list for student intake	
9-65	Check list/reference	
9-66	Certification process in VA ONCE	
9-67	Instructions for VA ONCE	
9-68	VA Work Schedule	June 28, 2005
10-1	Instructional Policies Council Minutes	December 1, 2008
10-2	2008-2009 IPC Membership	March 5, 2009
10-3	Email to Rita Frangione	January 4, 2007
10-4	Email from Linda Pierce, VBASEAT	October 16, 2006
10-5	SSB 5002 - Fallen Veteran Waiver FPS 72	July 22, 2007
10-6	Email from Mary Alice Grobins	October 16, 2007
10-7	Email from Chuck Greenough	November 6, 2007
10-8	SSB Instructions	
10-9	Email from Mary Alice Grobins	October 16, 2007
10-10	Email to Dianna Larsen, Joseph Koroma, Janell Whiteley	October 4, 2007
10-11	Email from Janell Whiteley	September 24, 2007
10-12	Letter to file	September 3, 2008
10-13	Discussion document	
10-14	Notes on Chapter 35 Process	August 3, 2007
10-15	Fallen Veterans' Waiver	June 29, 1905
10-16	Discussion document	
10-17	SSB 5002 - Fallen Veteran Waiver FPS 72	
10-18	Form letter to 100% tuition waiver students	
10-19	New restrictions for Veteran tuition waivers	
10-20	Email from Wendy Miles DVA	January 3, 2008
10-21	Email from Ralph Ibarra	December 6, 2007
10-22	Email from Mark Fischer	May 28, 2008
10-23	BLANK	
10-24	Email to Dr. Meyer	April 25, 2008
10-25	Email from Mark Fischer	April 17, 2008

# Director's Determination for McFadden v. OC

ALLO-09-046

Page 12

10-26	Email from Michael Ball	April 10, 2008
10-27	Email from Mark Fischer	April 9, 2008
10-28	Email from Mark Fischer	April 9, 2008
10-29	Email from Mark Fischer	April 8, 2008
10-30	Email from Mark Fischer	March 13, 2008
10-31	Email from Ralph Ibarra	December 6, 2007
10-32	Notes on conversation with Ric Price	March 19, 2008
10-33	Notes from brainstorming session	
10-34	Email from Recruitment & Retention	May 19, 2008
10-35	Email to Veterans' Services	September 26, 2008
10-36	Email from Patricia Lyons	July 24, 2008
10-37	Email from Mona Sanders	June 29, 2006
10-38	Email to Lee Williams	June 23, 2006
10-39	Email from Lee Williams	June 22, 2006
10-40	Email to Robert Parker	May 16, 2006
10-41	Letter to Michael Ball	December 28, 2007
10-42	Email from Debbie O'Neill	September 6, 2006
10-43	Notes on Veteran Certification and Environmental Programs	October 21, 2008
10-44	Notes on Leon Williams Scholarship	
10-45	Leon Williams Scholarship form	
10-46	Email to Joan Hanten	February 25, 2008
10-47	Email to Joan Hanten	February 19, 2008
10-48	Email to Jim McGonigle	February 19, 2008
10-49	Email to Linda Roper, Lorraine Shells, Kim McNamara, Sonia Begert	December 17, 2007
10-50	Email from Jim McGonigle	November 27, 2007
10-51	Email from Jim McGonigle	December 12, 2007
10-52	Email from Joseph Koroma	
11-1	Work study guidelines	May, 2007
11-2	FERPA Basic Information	January 2, 2008
11-3	Security Agreement for Users of the OC Student Management Sys.	February 1, 2008
11-4	Time Cards	Various
11-5	Email to Joseph Koroma	September 18, 2007
11-6	Email from Joseph Koroma	December 10, 2007
11-7	Email to Veteran Services	June 20, 2007
11-8	Email from Lu Ann Korthanke	
11-9	Email from Judie Jose	December 24, 2007
11-10	Email from Meredith Cox	
11-11	Letter to Robert Parker	
11-12	Help Wanted flyer	
11-13	Program Assistant interview questions	
11-14	Notes for Program Assistant	November 1, 2007
11-15	Request for staff	
12-1	Veterans' Services office overview	
12-2	Enrollment Services	
12-3	Veterans' Services office overview	

12-4	Mission statement	October 1, 2007
12-5	Email from Gina Huston	October 30, 2007
12-6	Mission statement	October 1, 2007
12-7	Student Services Self-Evaluation	October 1, 2007
13-1	Voucher Distribution form	

---